



Department of Revenue

FY27 Strategic Plan

Director Mary Mosiman

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Mission, Vision, Values

Mission

To serve Iowans through the responsible collection and generation of revenue to support the public good.

Vision

The Iowa Department of Revenue will be a state agency that uses innovation to make it simple to comply with tax obligations, follow alcoholic beverage industry requirements, and deliver fun and fair lottery experiences.

Values

- Integrity first
- Dedicated to teamwork
- Ready to serve

FY27 Strategic Initiatives

- Responsible Revenue Generation
- Department Optimization

Organizational Chart

Iowa Department of Revenue Mary Mosiman							Public Information Officer John Fuller
Alcohol & Tax Compliance	Alcohol & Tax Operations	Financial Services	Internal Services	Legal Services & Appeals	Local Government Services	Lottery	Research & Policy
Individual & Corporate Tax & Alcohol Licensing	Alcohol Operations	Accounting	Customer Experience	Enforcement Actions and Appeals	Appraisal	Investigations	Tax Research & Program Analysis
	Collections	Budget	Data Analytics			Sales & Marketing	
Sales & Excise Tax & Alcohol Regulation		Tax Operations	Procurement		Human Resources	Equalization, Assessor Education & Distributions	
	Lottery Internal Audit / Draw		Strategy Realization	Legal Services	External Relations		Policy
			Security & Disclosure Unit				

Legend
Division
Bureau
Unit

Assessment

The Iowa Department of Revenue serves eight customer groups, as identified in Figure 1. Any assessment of IDR's strengths and limitations, as well as external threats and opportunities, applies the lens and perspectives of these customers.

IDR senior leaders outlined the organizational capabilities required to serve the identified customers. The leaders determined the strategic initiatives to be implemented to enhance selected capabilities following strengths, weaknesses, opportunities, and threats (SWOT) analysis.

Through this analysis, they evaluated IDR's capacity to respond to customer needs and reviewed available resources, structure, services, activities, and policies that may impact the achievement of agency goals.

As one of the eight customer groups, IDR employees continue to be the Department's greatest asset and their engagement is vitally important to success. Formal and informal employee feedback drives IDR's recruitment, enrichment, and retention initiatives.

Department leadership continues to assess national and state trends directly relevant to IDR's mission.

This plan was updated on July 1, 2026.

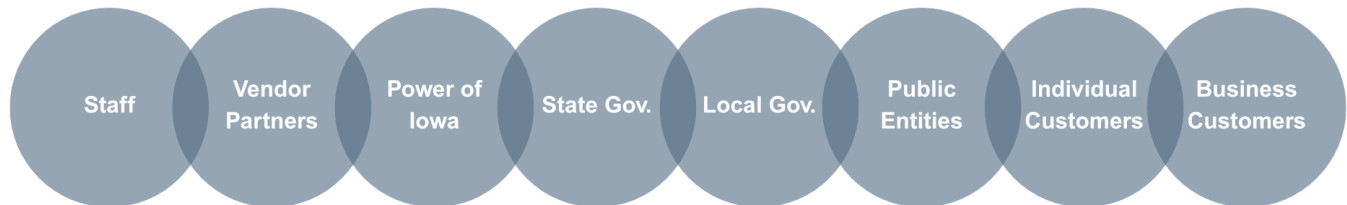


Figure 1

Strategic Initiatives, Goals, and Key Performance Indicators

In FY2027, the Department of Revenue will generate revenue for other agencies to support all of the Governor's enterprise priorities through the execution of this strategic plan.

Responsible Revenue Generation

Goal: Complete the tax administration component of the Modernization Program to streamline workflows, increase knowledge and improve efficiency by FY28, ending with a revenue benefit realization index greater than 1.

- KPI: Utilize IMPACT and GovConnectIowa to automate front end compliance programs and reallocate resources to back-end audit programs.
- KPI: Reduce collections vendor costs based on automated processes and the ability to distinguish when payments were received on early case debt.

Goal: Support revenue generation from alcohol and lottery sales through a responsive, consultative selling approach by FY28.

- KPI: Manage gross lottery sales and net proceeds as compared to current year budget performance and prior year actual performance.
- KPI: Manage gross alcohol sales and net proceeds as compared to prior year actual performance

Goal: Improve revenue generation by optimizing use of collections tools and back-end compliance programs by FY28.

- KPI: Increase total amount of debt managed and collected for partners by 10% through expansion of centralized collections activities.
- KPI: Increase dollars collected within 60 days after a recommendation is applied by the debt scoring model.

Department Optimization

Goal: Improve customer service rates related to interactions with lowans and iowa employers by enhancing self-service and call center capabilities by FY28.

- KPI: Unsure responses and interactions for the AI-supported chatbot (“The Kernel”) are below 10%.
- KPI: Utilize call center statistics to reduce abandonment rate and average call wait time.
- KPI: Percent of “front-facing” web forms abandoned on GovConnectIowa is less than 50%.

Goal: Expedite appeal processing by implementing streamlined procedures and leveraging potential automation tools to reduce the average time to close a case or move it to litigation to 18 months by FY28.

- KPI: Establish a Department policy and framework for the use of Generative AI and Automation Tools.
- KPI: Establish a Department framework for the assessment and evaluation of Generative AI use cases.
- KPI: Bring the department appeals pilot use case to successful closure and reach a “go/no-go” decision on full implementation.